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ABSTRACT

Concern about how much television alcohol advertising reaches underage youth and how the advertising influences their attitudes and decisions about alcohol use has been widespread for many years. Lacking in the policy debate has been solid, reliable information about the extent of youth exposure to television alcohol advertising. To address this critical gap, the Center on Alcohol Marketing and Youth commissioned Virtual Media Resources, a media planning and research firm in Natick, Massachusetts, to analyze television alcohol advertising in 2001, using the same data and methodology as professional media planners. In auditing 208,909 alcohol ad placements on television in 2001, the Center on Alcohol Marketing and Youth found the following: the alcohol industry's voluntary guidelines for ad placements on television are so lax that they allow the substantial exposure of youth to alcoholic beverage advertising, including advertising on programs with disproportionate numbers of young people in the viewing audience; even when adults were more likely to see television alcohol advertising than youth, in many instances youth saw almost as much television alcohol advertising as the adults; and because of the placement of the commercials, almost a quarter of alcohol advertising on television in 2001 was more likely to be seen by youth than adults. (Author)

*Television:
Alcohol's Vast Adland*

Report of the
Center on Alcohol Marketing and Youth

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TELEVISION: ALCOHOL'S VAST ADLAND

Center on Alcohol Marketing and Youth

Executive Summary

Concern about how much television alcohol advertising reaches underage youth and how the advertising influences their attitudes and decisions about alcohol use has been widespread for many years. Lacking in the policy debate has been solid, reliable information about the extent of youth exposure to television alcohol advertising. To address this critical gap, the Center on Alcohol Marketing and Youth commissioned Virtual Media Resources, a media planning and research firm in Natick, Massachusetts, to analyze television alcohol advertising in 2001, using the same data and methodology as professional media planners.

In auditing 208,909 alcohol ad placements on television in 2001, the Center on Alcohol Marketing and Youth finds the following:

- 1) The alcohol industry's voluntary guidelines for ad placements on television are so lax that they allow the substantial exposure of youth¹ to alcoholic beverage advertising, including advertising on programs with disproportionate numbers of young people in the viewing audience.
- 2) Even when adults were more likely to see television alcohol advertising than youth, in many instances youth saw almost as much television alcohol advertising as the adults.
- 3) Because of the placement of the commercials, almost a quarter of alcohol advertising on television in 2001 was more likely to be seen by youth than adults.

The Standard for Measuring Youth Exposure

Youth are only 15% of the national television viewing population (age 12 and over) and represent only 15.6% of the general U.S. population, age 12 and up.² When advertising is placed on programs where the youth viewing audience is more than 15%, young people are more likely to see that advertising than adults. In 1999, the Federal Trade Commission pointed out that a few alcohol companies restricted their television ad placements to programming where the youth audience was 30%, 25%, or less, and called these "best practices."³ Noting that "30 percent of the U.S. population is under the age of 21, and only ten percent is age 11 to 17," the FTC concluded that the

¹ For this report, unless otherwise noted, youth are defined as persons ages 12-20, and adults are defined as persons ages 21 and over.

² Youth 12-20 are 15% of the Nielsen age 12+ universe estimate for the 12-month period ending 9/26/01 (33,300,000 out of 221,930,000 persons age 12+), and 15% of the Nielsen age 12+ universe estimate for the 12-month period beginning 9/27/01 (34,340,000 out of 229,150,000 persons age 12+). According to the 2000 US Census, there are 36.4 million youth ages 12-20, or 15.6% of the total US population of 233.3 million persons age 12+.

³ Federal Trade Commission. (September 1999). *Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers*: 10.

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alcohol industry's voluntary guidelines providing for a 50% threshold for underage youth in the audience "permits placement of ads on programs where the underage audience far exceeds its representation in the population."⁴

The FTC's recommendations notwithstanding, the voluntary advertising codes of the Beer Institute and the Distilled Spirits Council of the United States (DISCUS) suggest that alcohol advertisers refrain from airing their commercials on programs where young people are the majority of the viewing audience. Using a base of viewers age 12 and older, only one percent of all network and cable television programs in 2001 (187 out of 14,359) had an underage audience that was more than 50%. Thus the brewers' and distillers' voluntary codes leave 99% of the television landscape permissible for alcohol advertising.

Youth Exposed to High Volume of Alcohol Advertising on Television

Even when alcohol advertising was placed on programming with 15% or less youth in the viewing audience, youth exposure to alcohol advertising on television in 2001 was substantial and significant. In 2001 youth saw two beer and ale ads for every three seen by an adult. Given the high volume of beer and ale advertising to adults, this ratio translates into a high volume of youth exposure, representing more than 200 commercial exposures for the average youth, and far more exposures for those youth who are frequent viewers of television. Beer and ale advertising is by far the dominant television alcohol

advertising. Of the \$811.2 million in television advertising (208,909 ads) analyzed in this study, beer and ale accounted for 86% of the ad spending.

Four beer and ale brands accounted for more than 50% of the total spending of television advertising analyzed: Coors Light, \$114 million; Budweiser, \$108 million; Miller Lite, \$95.8 million; and Bud Light, \$88.7 million.

- Youth saw more than two Coors Light ads for every three seen by an adult.
- Youth saw more than one Budweiser ad for every two seen by an adult.
- Youth saw almost three Miller Lite ads for every four seen by an adult.
- Youth saw more than one Bud Light ad for every two seen by an adult.

Another way to assess the volume of alcohol advertising seen by youth is to compare it to product categories often considered youth-oriented. In this light, youth saw more beer and ale ads on television in 2001 than they saw ads for other product categories such as fruit juices and fruit-flavored drinks; or gum; or skin care products; or cookies and crackers; or chips, nuts, popcorn and pretzels; or sneakers; or non-carbonated soft drinks; or sportswear jeans.

Overall in 2001, alcohol advertising reached 89% of the youth audience, who on average saw 245 alcohol ads.⁵ But the 30% of youth who were most likely to see alcohol advertising on TV saw at least 780 ads.⁶

Youth Overexposed to Television Alcohol Advertising

Almost a quarter of the television alcohol advertising in 2001 – 51,084 ads – was delivered more effectively to youth than to adults.⁷ This means the advertising was placed on programs where the youth audience was higher than the percentage of youth in the television viewing population. That percentage is 15% nationally and varies slightly from market to market. By placing advertising on programs where the composition of the youth audience is higher than average, the youth audience is in effect "overexposed" to the advertising and is more likely to have seen it than the adult audience.

The alcohol industry placed these 51,084 ads on television in 2001 at a cost of \$119 million. Ten beer and "malternative" (also known as "low alcohol refresher") brands accounted for \$92 million of this spending:

- Miller Lite, \$18.5 million
- Heineken, \$16.2 million
- Coors Light, \$13.6 million
- Miller Genuine Draft, \$10.5 million
- Budweiser, \$8.4 million
- Bud Light, \$7.3 million
- Corona Extra, \$5.6 million
- Smirnoff Ice, \$4.8 million
- Foster's, \$3.8 million
- Mike's Hard Lemonade, \$3.5 million

The ads were broadcast on shows ranging from sports programs like *SportsCenter* and the NBA and Stanley Cup playoffs, to drama programs like *Dark Angel* and *X-Files*, variety programs like *MADtv* and *Saturday Night Live*, situation comedies like *That '70s*

⁴ Ibid.: 9.

⁵ Reach/Frequency sources and data are described in the Methodology section below.

⁶ Ibid.

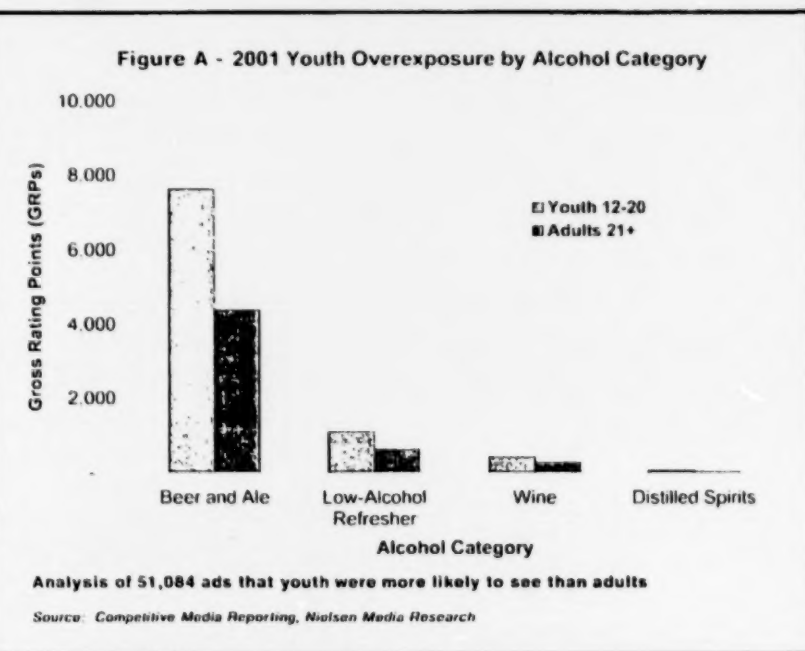
⁷ The 51,084 alcohol product ads were placed in programs for which the rating for youth ages 12-20 was greater than the rating for adults age 21 and over. (A rating is a percentage of the population that views a particular program or time period.) Ratings were the program quarter-hour ratings for program and time period in which the ad appeared.

Show and *Titus*, and talk shows like *Late Night with Conan O'Brien* and *The Daily Show*. (See Appendix A)

Five networks—WB, UPN, Comedy Central, BET and VH-1—routinely overexposed youth to alcohol advertising in 2001. Two types of programming—variety shows like *MADtv* on Fox and *Insomniac Music Theater* on VH-1, and music, video and entertainment shows like *Midnight Love* on BET and *Top 10 Countdown* on VH-1—also overexposed youth to alcohol advertising in 2001. For instance, youth had 110% greater exposure to alcohol advertising on Comedy Central than did legal-age adults. On variety shows, youth had 26% greater exposure to alcohol advertising than did legal-age adults.

Why the Concern about Alcohol Advertising

Underage drinking in the United States is marked by abuse. For 15- to 17-year-olds, 25% report being current drinkers, and 65% of those current drinkers report having had five or more drinks on at least one occasion.⁸ By the time they are 18 to 20 years old, 48% report being current drinkers, and 71% of those drinkers report having had five or more drinks on at least one occasion.⁹ The vast majority of the alcohol consumed by young people is for the purposes of intoxication: 92% of the alcohol drunk by 12- to 14-year-olds and 96% of the consumption by 15- to



17-year-olds and 18- to 20-year-olds is done when drinkers are having five or more drinks at one time.¹⁰ More than a thousand young drivers died in crashes after drinking in 2001.¹¹ While the total number of young drivers dying in motor vehicle crashes fell from 1999 to 2001, alcohol-related fatalities in this group are rising.¹²

In 2002, the Henry J. Kaiser Family Foundation and The National Center on Addiction and Substance Abuse at Columbia University surveyed youth about drinking and risky sexual behavior. Among 15- to 17-year-olds, 29% of the respondents said alcohol or drugs had influenced their decision to engage in sexual activity. Almost a quarter of

the 15- to 17-year-olds reported that they had done more sexually than planned because of alcohol or drug use. Slightly more than a quarter of this age group reported they were concerned about sexually transmitted diseases or pregnancy because of their alcohol or drug use.¹³

The voluntary advertising guidelines of the alcohol industry explicitly recognize the dangers of advertising that glamorizes or portrays abusive drinking behavior or sexual themes. For instance, the Beer Industry's voluntary code states: "Beer advertising and marketing materials should not depict situations where beer is being consumed excessively, in an irresponsible way, or in any way ille-

⁸ U.S. Department of Justice. (2002). *Drinking in America: Myths, Realities, and Prevention Policy*. Calverton: Pacific Institute for Research and Evaluation.

⁹ Ibid.

¹⁰ Ibid.

¹¹ U.S. Department of Transportation, National Highway Traffic Safety Administration. *Traffic Safety Facts 2001: Young Drivers*. Washington D.C.: National Center for Statistics and Analysis.

¹² Ibid. and Centers for Disease Control and Prevention. "Notice to Readers: Alcohol Involvement in Fatal Motor-Vehicle Crashes—United States, 1999-2000." *MMWR Weekly*. 30 Nov 2001. <<http://www.cdc.gov/mmwr/preview/mmwrhtml/mm5047a8.htm>>. (19 Nov 2002).

¹³ The Henry J. Kaiser Family Foundation and the National Center on Addiction and Substance Abuse at Columbia University. "Substance Abuse and Risky Behavior: Attitudes and Practices Among Adolescents and Young Adults." *Survey Snapshot*. 6 February 2002. <<http://www.kff.org/content/2002/3215/CASASurveySnapshot.pdf>>. (19 Nov 2002).

gally."¹⁴ It goes on to state: "Beer advertising and marketing materials should not portray sexual passion, promiscuity or any other amorous activities as a result of consuming beer." The DISCUS advertising guidelines contain similar admonitions to its members. For instance, "Distilled spirits advertising and marketing should portray distilled spirits and drinkers in

a responsible manner. These materials should not show a distilled spirits product being consumed abusively or irresponsibly."¹⁵

The Federal Trade Commission (FTC) has noted that "while many factors may influence an underage person's drinking decisions, including among other things parents, peers and media, there is

reason to believe that advertising also plays a role."¹⁶ Research studies have found that exposure to and liking of alcohol advertisements affects young people's beliefs about drinking, intentions to drink, and actual drinking behavior.¹⁷

Center on Alcohol Marketing and Youth

www.camy.org

The Center on Alcohol Marketing and Youth at Georgetown University monitors the marketing practices of the alcohol industry to focus attention and action on industry practices that jeopardize the health and safety of America's youth. Reducing high rates of underage alcohol consumption and the suffering caused by alcohol-related injuries and deaths among young people requires using the public health strategies of limiting the access to and the appeal of alcohol to underage persons.

The Center is supported by grants from The Pew Charitable Trusts and The Robert Wood Johnson Foundation to Georgetown University.

Virtual Media Resources

The Center commissioned Virtual Media Resources to conduct this analysis. Virtual Media Resources is a media research, planning, market analysis and consulting firm based in Natick, Massachusetts, serving communications organizations and marketers in a wide variety of market segments and media. VMR was established in 1992 to provide an independent research firm serving advertising agencies, and has grown to service over 100 clients across the US and Canada, including retail, publishing, financial, automotive, public health and other fields.

VMR adhered to industry-standard methodologies in conducting this analysis, using standard industry sources. More information about the analysis used to create this report is included in the Methodology section.

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¹⁴ Beer Institute. "Advertising & Marketing Code." <<http://www.beerinstitute.org/admarkcode.htm>> (19 Nov 2002).

¹⁵ Distilled Spirits Council of the United States. "Code of Good Practice for Distilled Spirits Advertising and Marketing." 1998. <<http://www.discus.org/industry/code/code.htm>> (19 Nov 2002).

¹⁶ Federal Trade Commission. *Self-Regulation in the Alcohol Industry*. 4.

¹⁷ Grube, J. "Alcohol advertising-a study of children and adolescents: preliminary results." <http://www.prc.org/prc/prc_videopresentations_grube_aasca.html>. (19 Nov. 2002).

Introduction

Television is the primary advertising medium used by advertisers in general, and by the beer and ale, low alcohol refreshers (also known as "alcopops" or "malternatives")¹⁸ and wine categories in particular. Television provides advertisers with a way to provide broad and timely advertising exposure. Nonetheless, most advertisers are very selective about the programs in which they appear; as with any advertising medium, advertisers are typically concerned with both the demographics of the audience, and with the environment in which their ads appear. Television advertising is a substantial investment, and advertisers and their ad agencies go to great lengths to ensure that the right audience is delivered at the intended time, in negotiated programs, and for the agreed price.

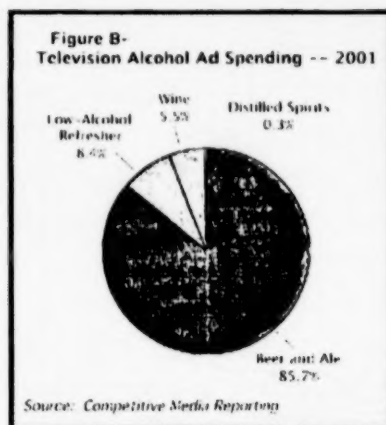
In addition to broad and immediate audience reach, television provides advertisers with more targeted delivery of advertising messages through selected networks, channels and programs that have a narrowly defined audience. Today, 98% of U.S. households have one or more televisions, and the average television home receives 71 channels.¹⁹

About This Report

This report analyzes \$811.2 million in product advertising on television during calendar year 2001, representing 208,909 advertisements that were placed on network, cable, and spot television as monitored by Competitive Media Reporting 2001 (CMR), a widely accepted industry source for commercial expenditure and occurrence tracking. This represents 87% of the total \$928 million in measured spending by the alcohol industry for television advertising in 2001. Non-product advertisements, representing the bal-

ance of television alcohol advertising, were not included in this analysis.

Of the \$811.2 million in measured TV ad spending by the alcoholic beverage industry, beer and ale accounted for 86% of the spending (or \$695 million); low alcohol refreshers were 8% of total spending with \$68.1 million; most of the balance was wine, with a small amount of distilled spirits advertising on local spot television (local affiliates for the national broadcast networks and local independent stations).



This report does not include alcohol product advertising bought directly on local cable systems or cable interconnects; such advertising may appear on cable channels and on broadcast channels that are delivered via cable television. In 1996, when some distilled spirits producers announced that they were ending their industry's voluntary ban on television advertising, they first turned to local cable television. The impact of that decision is therefore not reflected in this report. Nor was advertising data from Hispanic networks such as Univision and Telemundo included in this analysis. The standard industry sources used for this report do not include data for either Hispanic networks or locally-purchased cable advertising.

In addition to traditional ads, the alcohol industry reaches the television audience with product placements in various kinds of programming and with televised signage at sporting events. The impact of those marketing techniques is also beyond the scope of this report.

Auditing Alcohol Advertising on Television

In its 1999 report on alcohol industry advertising and marketing practices, the FTC called on the industry to monitor and audit the placement of its advertising.²⁰ The analysis in this report is an audit of what the alcohol industry actually did with its television advertising in 2001. Conducting an audit of this kind allows the public, the industry and policymakers to have a solid basis of facts and data to determine the alcohol industry's practices in relationship to underage youth. As an audit, this is an after-the-fact analysis of what the industry did in 2001. By conducting an audit, the industry or a company can see what happened and change practices in the future.

This report was based on data, applications and analysis commonly used by advertisers, advertising agencies and television networks and stations in order to plan, buy and sell television advertising. For this analysis, the Center on Alcohol Marketing and Youth commissioned Virtual Media Resources to analyze 2001 data from CMR and Nielsen Media Research. CMR provides extensive information on advertising occurrences and expenditures; Nielsen is the advertising industry's principal source for television ratings information and audience demographics. License restrictions prohibit reproduction of specific Nielsen ratings data.

¹⁸ Many of the beverages in this category contain 5% alcohol, more than most beers.

¹⁹ Media Dynamics, Inc. (2002). *TV Dimensions 2002*. New York: Media Dynamics.

²⁰ Federal Trade Commission. *Self-Regulation in the Alcohol Industry*: ii.

Section One – Why Youth Saw More Television Alcohol Advertising

Alcohol Industry Guidelines Allow for Overexposure

The alcohol industry trade associations have voluntary guidelines on the placement of advertising in an effort to limit youth exposure to alcohol marketing. The Beer Institute and the Distilled Spirits Council of the United States (DISCUS) call for their members not to place advertising on programs where the underage audience is in the majority (i.e., over 50%).²¹ The Wine Institute calls for ads not to be placed in programs where more than 30% of the audience is underage.²²

However, these industry guidelines do not effectively limit youth exposure to alcohol marketing. In fact, only about one percent of TV programs (187 out of 14,359 programs) tracked by Nielsen on 54 cable and broadcast networks had a youth audience in excess of 50% of the 12+ national television audience.²³ Only six percent of the pro-

grams had an underage audience composition greater than 50% of the total age 2+ audiences.²⁴

Only about seven percent of the TV programs (951 out of 14,359 programs) had a youth audience in excess of 30% of the age 12+ national audience; only 13% had an underage audience composition greater than 30% of the total age 2+ audience.²⁵

By setting their placement standards for allowing underage viewers at thresholds like 50% and 30%, the industry routinely allows placement of alcohol ads on programming where the actual percentage of underage viewing audience is greater than the percentage of underage youth in the national television viewing population.

Youth are only 15% of the Nielsen television audience (age 12 and over),²⁶ and are only 15.6% of the general U.S. population age 12+.²⁷ In fact, their presence in the audience actually viewing television only averages 10%.²⁸

Even if the industry observed a 15% threshold, the 51,084 ads seen by a greater percentage of youth than adults in 2001 would have been reduced to 22,135—a 57% reduction in the number of ads overexposing youth to alcohol. And even this threshold allows for the viewing of alcohol advertising by millions of underage youth in the case of major sporting events such as the Super Bowl or awards shows such as the Academy Awards.

Table 1 -

Ads Overexposing Youth	# of Ads	% of Ads Overexposing Youth
15%+ Youth Audience Composition	28,949	57%
<15% Youth Audience Composition	22,135	43%
Total Ads	51,084	100%

²¹ Beer Institute. "Advertising & Marketing Code." Distilled Spirits Council of the United States. "Code of Good Practice for Distilled Spirits Advertising and Marketing."

²² Wine Institute. "Code of Advertising Standards." December 2000.

http://www.wineinstitute.org/communications/statistics/Code_of_Advertising.htm. (19 Nov 2002).

²³ Of 14,359 national broadcast and cable programs measured by Nielsen in 2001, 187 (1.3%) had an average youth audience composition of >50%, using an audience of persons ages 12-20 against a base of persons age 12+.

²⁴ Of 14,359 national broadcast and cable programs measured by Nielsen in 2001, 888 (6.2%) had an average youth audience composition of >50%, using an audience of persons ages 2-20 against a base of persons age 2+.

²⁵ Of 14,359 national broadcast and cable programs measured by Nielsen in 2001, 951 (6.6%) had an average youth audience composition of >30%, using an audience of persons ages 12-20 against a base of persons age 12+, and 1870 (13.0%) had an average youth audience composition of >30%, using an audience of persons ages 2-20 against a base of persons age 2+.

²⁶ Nielsen age 12+ universe estimate. See footnote 2.

²⁷ 2000 US Census. See footnote 2.

²⁸ Using an hour-by-hour Nielsen PUT (Persons Using Television) analysis for 2001 of youth ages 12-20 as a percentage of all TV viewers age 12+.

Another analysis shows how the current voluntary industry guidelines expose teenagers, ages 12 to 17, to significant amounts of alcohol advertising. In 1999, the FTC reported that alcohol ads had appeared on "at least three of the 15 television shows reported to have the largest teen audiences," citing a list of popular television programs in a *Washington Post* article on marketing to teens.²⁹ "These shows may be among the best ways to reach teens, although they often have a majority legal-age audience," the FTC continued. In calendar year 2001, the alcohol industry spent over \$31 million and placed 1,441 ads on 13 of the 15 prime time network programs with the largest teen audiences for the week of October 15-21, 2001 (a time period comparable to that for the shows cited in *The Washington Post* article in the FTC report). In some instances, the advertising was minimal—isolated buys on local television stations. But for six of the programs, alcohol industry spending and ad placement were done at the network level, reaching millions of teen viewers. The following table provides the details of this analysis.

Table 2- Top 15 Teen Television Programs and Alcohol Ads

Rank	Network	PROGRAMS	2001 Alcohol Ads		
			Number	Dollars	Network/Spot
1	WB	7TH HEAVEN - WB	5 S	835	Spot
2	CBS	SURVIVOR: AFRICA	108 S	1,048,111	Network, Spot
3	NBC	FRIENDS	429 S	17,504,107	Network, Spot
4	NBC	E.R.	197 S	6,222,795	Network, Spot
5	ABC	ABC SUN PICTURE SHOW	2 S	4,726	Spot
6	ABC	MY WIFE AND KIDS	44 S	156,213	Spot
7	CBS	CSI	197 S	765,417	Network, Spot
8	WB	GILMORE GIRLS - WB	6 S	7,751	Spot
9	UPN	WWF SMACKDOWN!	24 S	16,094	Spot
10	WB	SMALLVILLE - WB	0 S	-	None
11	ABC	ACCORDING TO JIM	13 S	35,865	Spot
12	FOX	THAT '70S SHOW	382 S	5,557,531	Network, Spot
13	UPN	BUFFY THE VAMPIRE SLAYER	14 S	2,314	Spot
14	UPN	ONE ON ONE	0 S	-	None
15	UPN	PARKERS, THE	20 S	274,139	Network, Spot
Total			1,441	\$ 31,595,898	

- Top 15 television programs were the top 15 prime time network television programs ranked by persons 12-17 audience size for the week of October 15 to October 21, 2001. Source: Nielsen Media Research 2001
- Alcohol ads were all alcohol ads (network and spot) aired during these 15 programs at any time in 2001. Source: CMR 2001

Section Two – Alcohol Advertising Around the Dial

Youth Saw Almost as Much Alcohol Advertising as Adults

Sports programming accounted for almost 61% of total television spending (\$492 million) spent by alcohol advertisers in 2001, and on sports programs, youth saw more than one ad for every two seen by an adult. For situation comedies—the second largest category with almost \$85 million in alcohol advertising—youth were exposed to virtually the same amount of alcohol advertising as adults: nine ads to every ten seen by adults.

²⁹ Federal Trade Commission. *Self Regulation in the Alcohol Industry*:9.

Two programming categories—music video and entertainment, and variety shows—actually more effectively exposed alcohol advertising to the youth audience than to the adult audience. Youth saw 48% more advertising than adults on music video and entertainment programs. Variety programs delivered 26% more advertising to the youth audience than to adults.

Table 3 - Total Alcoholic Beverage Advertising by Program Type in 2001

Program Type	Total Dollars	Ads	Youth GRPs	Adult GRPs	Ratio	Youth as % of Total Audience
Award/Event/Parade/Celebration	\$ 9,173,486	434	167	267	0.63	12.3%
Children	\$ 106,478	745	8	8	0.68	14.2%
Documentary/Sports Tribute	\$ 7,263,747	4,198	477	767	0.68	10.3%
Game	\$ 58,207,814	18,072	1,538	2,217	0.69	8.5%
Infomercial/Magazine	\$ 3,747,684	4,779	281	437	0.66	10.4%
Game Shows	\$ 8,734,186	7,401	286	564	0.62	10.1%
Instructional/School	\$ 2,274,868	4,381	140	493	0.28	4.4%
Music	\$ 23,663,784	19,467	2,372	2,765	0.86	13.1%
Music Video & Entertainment	\$ 974,670	978	114	77	1.46	20.6%
News	\$ 14,293,879	18,546	426	1,743	0.34	5.7%
Public Affairs	\$ 354,502	532	31	60	0.52	8.4%
Sports	\$ 83,079,438	26,337	2,452	2,737	0.90	13.2%
Summit/Info	\$ 18,132,739	2,814	452	462	0.68	10.3%
Sports	\$ 494,695,626	59,341	8,569	15,580	0.55	8.9%
TV	\$ 50,983,469	37,663	1,392	3,028	0.59	9.4%
Unrated	\$ 4,588,153	4,381	600	387	0.67	10.6%
Variety	\$ 23,943,636	16,127	2,775	1,722	1.58	14.2%
Unknown	\$ 83,737	578	7	10	0.77	12.6%
Total	\$ 811,166,404	208,909	21,801	34,087	0.64	10.1%

Source: Competitive Media Reporting, Nielsen Media Research

Alcohol ads broadcast on national network television gave the industry its broadest reach in 2001, with 5,367 ads at a cost of \$515.2 million. For every two of these ads seen by adults, youth saw one. The most targeted television advertising is available on cable, where in 2001, the alcohol industry placed 57,430 ads, spending almost \$175.2 million with the vast majority (\$81.1 million) being spent on ESPN. For every four ads seen by adults on cable, youth saw three. Alcohol companies bought 145,842 ads on spot television. Spending for these ads represented 15% of the advertising dollars—\$120.7 million—and on spot television, youth saw three ads for every five seen by adults.

Table 4 - All Alcohol Advertising by Television Media Type - 2001

Type	Total Dollars	Ads	Youth GRPs	Adult GRPs	Ratio	Youth as % of Total Audience
Cable	\$ 175,178,152	57,430	10,153	13,531	0.75	11.7%
Spot	\$ 120,746,152	145,842	2,893	4,743	0.61	9.7%
Network	\$ 515,242,100	5,637	8,755	15,812	0.55	8.9%
Total	\$ 811,166,404	208,909	21,801	34,087	0.64	10.1%

Source: Competitive Media Reporting, Nielsen Media Research

Of the four major broadcast networks—ABC, CBS, Fox and NBC—NBC accounted for the most alcohol ad dollars spent in 2001: almost \$222 million, which was only slightly less than the combined totals for ABC (\$95 million) and CBS (\$135 million). Fox accounted for \$129 million in spending. On Fox, youth saw two ads for every three seen by adults; on NBC, youth saw three ads for every five seen by adults. On both ABC and CBS, youth saw two ads for every five seen by adults.

Two smaller broadcast networks—WB and UPN—each exposed youth to more advertising than adults. Alcohol ads on WB were seen by youth 56% more often than they were seen by adults. UPN also delivered more alcohol ads to youth than to adults. (See Table 7, p.10).

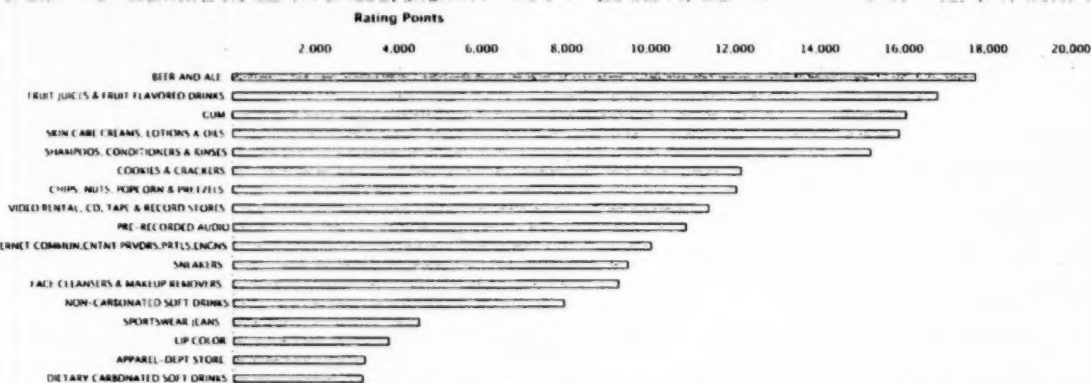
Beer and Ale in Comparison to Other Products

The dominant alcohol products advertised on television are beer and ale (see Figure B). In 2001, beer and ale advertising on television amounted to \$695 million, which exposed the youth audi-

ence to 17,647 Gross Rating Points (GRPs).³⁰ The beer and ale advertising delivered to the underage youth audience in 2001 was greater than the advertising by various products normally associated with the youth audience. For instance, beer and ale advertising exceeded the advertising delivered to the youth audience for fruit juices and fruit-flavored drinks, gum, skin care

products, sneakers, non-carbonated soft drinks, and sportswear jeans. This contrast of advertising volume among various categories is intended to show the comparative volume of advertising to which youth were exposed, noting that beer is relatively large; advertising budgets and media buys for products are not determined by comparing products or brands in different categories.

Figure C - Youth Exposure to 2001 Television Advertising: Beer vs. Youth Products



Source: Competitive Media Reporting, Nielsen Media Research

Section Three – Youth Overexposed to Television Alcohol Advertising

Brands Overexposing Youth

Of the \$811.2 million in alcohol advertising on television, \$119 million worth, or 51,084 ads, actually reached a greater percentage of youth than adults. This means the advertising was placed on programs where the youth audience was higher than the percentage of youth in the television viewing population.

Table 5 - 2001 Television Alcohol Advertising: Youth Overexposure by Beverage Type

Beverage Type	Total Dollars	Ads	Youth GRPs	Adult GRPs	Ratio
Beer and Ale	\$ 104,135,802	41,683	7,652	4,413	1.73
Low-Alcohol Refresher	\$ 11,012,878	6,291	1,101	631	1.75
Wine	\$ 3,029,896	2,557	427	265	1.61
Distilled Spirits	\$ 491,768	553	66	39	1.68
Total	\$ 118,670,344	51,084	9,246	5,348	1.73

Source: Competitive Media Reporting, Nielsen Media Research

GRPs are used to measure the gross audience delivery for advertising: for instance, 1,000 GRPs may mean that 50% of an audience saw an ad 20 times over a given period, or that 80% of the audience saw an ad an average of 12.5 times over that period.)

³⁰ GRPs are used to measure the total audience exposed to advertising: for instance, 1,000 GRPs may mean that 50% of an audience saw an ad an average of 20 times over a given period, or that 80% of that audience saw an ad an average of 12.5 times over that period.

When youth 12-20 are compared to young adults 21-34, 48,860 of the total 208,909 television alcohol ads audited in this report reached more youth than young adults. In other words, more than 23% of all television alcohol ad placements in 2001 reached underage youth more effectively than the young adult audience.

In terms of brands that accounted for the \$119 million of advertising that youth were more likely to see than adults, 10 brands accounted for \$92 million, or 77%.

Table 6 - Brands Overexposing Youth

Brand	Ad Dollars	Ads	Programs ³¹
Miller Lite	\$ 18,525,590	4,167	SportsCenter, That '70s Show, Dark Angel, Titus, NBA Finals Game 4
Heineken Beer	\$ 16,185,179	1,564	Grammy Awards, Titus, That '70s Show, Dark Angel, Steve Harvey
Coors Light Beer	\$ 13,603,000	9,855	SportsCenter, MADtv, Daily Show, Friends, Saturday Night Live
Miller Genuine Draft	\$ 10,480,669	2,211	SportsCenter, NBA All-Star Game, That '70s Show, Titus, MADtv
Budweiser Beer	\$ 8,423,477	3,735	Major League Baseball, Pro Basketball Game, NBA Finals Game 4, SportsCenter, NBA Basketball Playoffs
Bud Light Beer	\$ 7,257,917	2,510	Saturday Night Live, Major League Baseball, Pro Basketball Game, Stanley Cup Playoffs, Pro Hockey Game
Corona Extra Beer	\$ 5,588,329	2,862	MADtv, SportsCenter, Baseball Tonight, Saturday Night Live, Behind the Music
Smirnoff Ice Malt Beverage	\$ 4,825,060	2,664	That '70s Show, Late Night with Conan O'Brien, Saturday Night Live, SportsCenter, Howard Stern Show
Foster's Beer	\$ 3,809,139	1,649	MADtv, Saturday Night Live, SportsCenter, Late Night with Conan O'Brien, Baseball Tonight
Mike's Hard Lemonade Malt Beverage	\$ 3,519,820	2,437	Major League Baseball, Boot Camp, NBA Basketball Playoffs, Man Show, Saturday Night Live
Subtotal	\$ 92,218,180	33,654	

Youth Overexposure on Networks, Programs

Of the \$119 million, the alcohol industry spent \$46 million on network television ads. Of this total, 48% of the industry spending was on Fox, and 36% was on NBC. *MADtv*, *That '70s Show*, *Titus*, *Dark Angel*, and *Temptation Island* were among the Fox programs with advertising that more effectively reached the underage audience than legal-age drinkers. *Saturday Night Live*, *Late Night with Conan O'Brien*, and a large array of sports were the NBC programs that more effectively reached youth than adults.

Table 7 - 2001 Television Alcohol Advertising: Youth Overexposure by Broadcast Network

Network	Total Dollars	Ads	Youth GRPs	Adult GRPs	Ratio	% of \$
FOX	\$ 22,051,100	247	889	610	1.46	48%
NBC	\$ 16,922,200	336	547	475	1.15	36%
CBS	\$ 3,115,100	27	78	67	1.16	7%
UPN	\$ 1,633,600	97	135	84	1.60	4%
WB	\$ 1,410,600	39	59	37	1.59	3%
ABC	\$ 1,250,400	33	39	33	1.17	3%
Total	\$ 46,383,000	779	1,747	1,307	1.34	100%

Source: Competitive Media Reporting, Nielsen Media Research

³¹ Programs in tables in this report are examples, and not an exhaustive listing.

The industry spent another \$51 million to place 19,116 ads on cable television that more effectively reached youth than adults. Of this total, ESPN accounted for 44% of the spending, Comedy Central accounted for 15%, VH-1 accounted for 9%, and TBS accounted for 7% of spending. According to a Spring 2002 report by Teenage Research Unlimited, a leading national market research firm on teens, 46% of teens in cable households watch ESPN weekly, 60% watch Comedy Central, 45% watch VH-1 and 44% watch TBS.³⁹

Table 8 - 2001 Television Alcohol Advertising: Youth Overexposure by Cable Network

Source		Total Dollars	Ads	Youth GRPs	Adult GRPs	Ratio	% of \$
ESPN	\$	22,084,347	4,182	1,113	695	1.60	44%
Comedy Central	\$	7,395,701	3,739	1,512	617	2.45	15%
VH-1	\$	4,675,370	3,516	661	308	2.14	9%
TBS	\$	3,356,759	628	538	345	1.56	7%
TNT	\$	2,967,123	332	232	164	1.42	6%
E!	\$	2,532,371	1,587	321	184	1.75	5%
USA	\$	1,665,910	579	394	219	1.80	3%
FX	\$	1,549,930	741	235	154	1.53	3%
ESPN2	\$	1,213,939	1,405	186	93	1.99	2%
BET	\$	1,044,946	893	332	143	2.32	2%
other	\$	2,066,907	1,514	415	265	1.57	4%
Total	\$	50,553,303	19,116	5,939	3,186	1.86	100%

Source: Competitive Media Reporting, Nielsen Media Research

Spot television accounted for just over \$21 million in spending on the ads that overexposed youth. On these 31,189 spot television ads that had youth overexposure, youth saw 83% more of this alcohol advertising than adults.

For programming where the 51,084 ads were more effectively delivered to youth than adults, three categories—sports, sitcoms and variety—accounted for 70% (\$83 million) of the spending. For this group of ads in sports programming, youth saw 54% more advertising than adults; for ads in sitcoms, youth saw 84% more advertising; and for ads in variety shows, youth saw 88% more advertising.

Table 9 - 2001 Television Alcohol Advertising: Youth Overexposure by Programming

Program Group		Total Dollars	Ads	Youth GRPs	Adult GRPs	Ratio	Youth as % of Total Audience
Sports	\$	48,184,452	11,630	2,144	1,391	1.54	21.4%
Sitcom	\$	20,033,796	11,454	1,536	836	1.84	24.5%
Variety	\$	14,927,497	7,051	1,635	872	1.88	24.9%
Movie	\$	8,398,636	3,327	1,428	817	1.75	23.6%
Drama	\$	7,541,674	3,515	548	338	1.62	22.2%
Talk	\$	4,639,242	5,940	583	321	1.82	24.3%
Award/Pagant/Parade/Celebration	\$	4,475,474	133	113	89	1.27	18.3%
Slice-of-Life	\$	2,607,229	458	156	107	1.46	20.5%
Documentary/Salute/Tribute	\$	1,993,667	1,220	279	159	1.76	23.7%
News	\$	1,409,739	1,590	187	99	1.89	25.0%
Game Show	\$	1,252,159	1,975	152	73	2.06	26.8%
Entertainment Magazine	\$	1,204,300	985	166	85	1.95	25.5%
Unclassified	\$	1,174,719	859	153	77	1.98	25.9%

Source: Competitive Media Reporting, Nielsen Media Research

³⁹ Teenage Research Unlimited. (2002). *The TRU Study, Spring 2002, wave 39*. Northbrook, IL: Teenage Research Unlimited, Inc: S40.

Industry's 50% Threshold Not Always Observed

Even the industry's 50% threshold is not always observed. In 2001, \$1.8 million was spent on 3,262 ads on programs where the youth audience exceeded the 50% guidelines established by both DISCUS and the Beer Institute.

The following table shows the 10 brands with the greatest advertising expenditures on programs that exceed the 50% guidelines, and for each brand, five programs exceeding the guideline, ranked by advertising expenditures.

Table 10 - Brands With Ads On Programs Exceeding The 50% Guidelines

Brand	Dollars	Ads	Programs
Miller Lite	\$205,320	212	INSOMNIAC MUSIC THEATER SATURDAY NIGHT LIVE BOOTY CALL KIDS IN/HALL NBA 2NIGHT
Budweiser Beer	\$190,009	309	MAJOR LEAGUE BASEBALL PRO BSKB GAME FUTBOL/LIGA MXCN-UNI CLG BSKB GAME BASEBALL TONIGHT
Coors Light Beer	\$173,036	760	LATE NGT/CONAN OBRIEN DAILY SHOW MAJOR LEAGUE BASEBALL DREW CAREY BOOTY CALL
Sam Adams Beer	\$160,597	156	INSOMNIAC MUSIC THEATER ROCK ACROSS AMERICA TOP 20 COUNTDOWN TOP TEN COUNTDOWN BEHIND THE MUSIC
Corona Extra Beer	\$160,416	230	INSOMNIAC MUSIC THEATER PRO BSKB GAME PRIMETIME GLICK ROCK ACROSS AMERICA SPORTSCENTER
Miller Genuine Draft	\$121,497	100	SATURDAY NIGHT LIVE MAJOR LEAGUE BASEBALL SPORTSCENTER PRO BSKB GAME KIDS IN/HALL
Foster's Beer	\$109,689	133	SATURDAY NIGHT LIVE KIDS IN/HALL HOW TO BE A PLAYER SPORTS NIGHT/CABLE BILL&TEDS EXCLNT ADV MV
Bud Light Beer	\$105,165	160	MAJOR LEAGUE BASEBALL PRO BSKB GAME PRO HOCKEY GAME COMICVIEW MIDNITE LOVE
Mike's Hard Lemonade Malt Beverage	\$88,010	130	FUTBOL/LIGA MXCN-UNI AMERICA AL MUNDIAL INSOMNIAC MUSIC THEATER CONTROL-UNI SATURDAY NIGHT LIVE
Guinness Beer	\$64,920	67	INSOMNIAC MUSIC THEATER TOP 20 COUNTDOWN COLLEGE BASKETBALL-ABC MUSIC VIDEOS BEHIND THE MUSIC

Conclusion

The alcohol industry has adopted guidelines on advertising placement that purport to limit the exposure of youth to alcohol advertising on television while allowing the industry to market its products to legal-age adults.

In fact, the industry guidelines place a very small percentage of television programming off limits for alcohol ads. Using a base of viewers age 12 and older, only one percent of all network and cable television programs in 2001 (187 out of 14,359) have an underage audience that is more than 50%—the beer and distilled spirits industries' threshold for not advertising. Using a base of viewers age 2 and older, only six percent of all network and cable television programs in 2001 (888 out of 14,359) have an underage audience that is more than 50%.

As it was in 2001, even the 50% threshold was violated. The alcohol industry spent \$1.8 million and placed 3,262 ads on programs where the underage audience was more than 50%.

More significantly, more than 51,000 alcohol ads were seen by a greater percentage of youth than adults in 2001.

The industry spent \$119 million on this advertising, and it represented nearly a quarter of the industry's television ad placements. Even when the alcohol industry placed ads on television that were seen by more adults than youth, underage youth were seeing a substantial amount of alcohol advertising. For instance, youth saw more beer and ale advertising in 2001 than they saw advertising for gum, or cookies and crackers, or sneakers. Often, youth were seeing two alcohol ads for every three seen by adults, or three alcohol ads for every four seen by adults.

Youth actually make up a smaller percentage of both the television viewing audience and the U.S. population in general than indicated by the alcohol industry guidelines. Youth are only 15% of the Nielsen television population (age 12 and over) and only 15.6% of the general population 12+.³³ Furthermore, their presence in the audience actually viewing television only averages 10% overall.³⁴

Even following a 15% threshold would still have resulted in more than 22,000 television ads in 2001 where a greater percentage of youth than adults would

have been exposed to the alcohol advertising. And a 15% threshold allows for the viewing of alcohol advertising by millions of underage youth in the case of major sporting events such as the SuperBowl or awards shows such as the Academy Awards. However, following this threshold would have provided more protection of youth than the current marketplace does.

In 1999, the Federal Trade Commission called upon the industry to adopt "best practices" on advertising placements. For television placements, the FTC pointed as a "best practice" to some companies adopting "a 70 to 75 percent legal-age audience for television placements."³⁵

This report shows that it is time for the FTC to review the alcohol industry's television advertising practices and to determine whether the "best practices" the Commission advocated in 1999 have been adopted and, more importantly, whether those practices indeed provide for adequate protection of the nation's youth from overexposure to alcohol advertising on television.

Methodology

Sources

This analysis was conducted using three primary resources:

- Competitive Media Reporting (CMR) provides date, time, source and expenditure data for each commercial occurrence;
- Nielsen Media Research provides demographic audience impressions and ratings at the quarter-hour level that are associated with each ad occurrence;
- *Impact* magazine provides industry-accepted classifications for all brands of alcoholic beverages.

³³ Nielsen age 12+ universe estimate. 2000 US Census. See footnote 2.

³⁴ Using an hour-by-hour Nielsen PUT (Persons Using Television) analysis for 2001 of youth ages 12-20 as a percentage of all TV viewers age 12+.

³⁵ Federal Trade Commission. *Self-Regulation in the Alcohol Industry*. 10.

Process

1. Aggregation levels

A database of all TV ad occurrences and relevant information was compiled. All data were aggregated and analyzed at the following levels:

- Media type (network, cable or spot)
- Network (NBC, Fox, ESPN, etc.)
- Program group (sports, sitcoms, etc. as defined by CMR)
- Daypart (time of day/week, using industry accepted classifications)
- Impact classification (beer and ale, low alcohol refreshers, wine, spirits)
- Brand (Coors Light, etc.)
- Parent company (Anheuser-Busch, etc.)

2. Calculating GRPs and Impressions

Youth audience composition was calculated using a base of viewers age 12 and over as defined by Nielsen, allowing for the annual universe estimate adjustment in September 2001. Composition for all programs was calculated at the commercial occurrence level based on quarter-hour ratings and impressions. National (network and cable) gross rating points (GRPs) and impressions were added with no adjustment, while spot TV GRPs were "nationalized" by summing the local market ad impressions and dividing the total by the national base.

Table 11 - Reach and Frequency of Television Alcohol Advertising -- 2001

Alcoholic Beverage Type	Youth Ages 12-20			Adults Age 21 and Over			
	Ad Exposure (Rating Points)	% Reached	Avg # Ads	Ad Exposure (Rating Points)	% Reached	Avg # Ads	Ratio
Beer and Ale	17,647	88	200	26,022	95	273	0.68
Distilled Spirits	144	44	3	230	59	4	0.63
Low-Alcohol Refresher	2,338	84	28	3,297	93	35	0.71
Wine	1,672	83	20	4,537	94	48	0.37
All Alcoholic Beverages	21,801	89%	246	34,087	96%	356	0.64

Source: Competitive Media Reporting, Nielsen Media Research

3. Counting and Qualifying Ads

Product alcohol ads were included in this analysis if we determined from their description that they were promoting products and not general corporate advertisements or public service announcements.

Table 12 - 2001 TV Advertisements Selected for Analysis

	Ads	Dollars	Percent Ads	Percent Dollars
Total Ads Reported	218,977	\$ 928,459,544	100%	100%
Product Ads on Network, Cable, and Spot TV	208,909	\$ 811,166,404	95%	87%

Source: Competitive Media Reporting

Alcohol ads were considered to overexpose youth if the quarter-hour youth rating exceeded the quarter-hour adult rating for the time period and program in which the advertisement appeared.

4. GRP calculations and estimated reach

GRPs for demographic groups were calculated by day-part, media type, network and program type, and were used to estimate reach and frequency using the Nielsen 1999 Persons Cume Study with T*View from Stone House Systems, a widely used application for estimating audience reach.

Table 13 -

Frequency Distribution for Television Alcohol Advertising

Reach (% of Youth Age 12-20)	Number of Exposures
89%	Net Reach (Any Exposures)
76%	100+ exposures
66%	200+ exposures
57%	300+ exposures
50%	400+ exposures
43%	500+ exposures
36%	600+ exposures
32%	700+ exposures
30%	780+ exposures

Frequency (number of exposures) and Reach percentages are estimated based on the 1999 Nielsen Persons Cume Study

Glossary

Rating

Audience as a percentage of a universe estimate.

Universe Estimate

Total persons or homes in a given population, e.g. television households in the U.S. or persons ages 12-20 in the U.S.

Gross Rating Points (GRPs)

The sum of ratings of a set of programs or ad occurrences, including multiple exposures. GRPs are the most common measure of media weight. For example, 200 GRPs may represent the number of exposures required to reach 50% of a given population an average of 4 times, or 80% of the same population an average of 2.5 times.

Reach

The number of homes or persons in a given population exposed at least once to a program or an ad schedule; may be expressed as a percentage of the population. Reach is typically estimated according to the particular networks, programs, and dayparts that are used in a schedule.

Average Frequency

The average number of times a population is exposed to programs or commercials in a given schedule.

Appendix A

Following is a set of charts showing the top network and cable programs where the alcohol industry aired ads that youth were more likely to see than adults.

Top network program charts

Top 10 Network TV Sports Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
NBC	NBA ALLSTAR GAME	\$ 2,600,000
NBC	NBA FINALS GM 4	\$ 2,240,000
NBC	NBA BSKB GM-2	\$ 1,491,000
NBC	NBA BSKB GM-1	\$ 1,017,500
NBC	XFL FOOTBALL	\$ 865,700
NBC	NBA PLAYOFF GAME 1	\$ 725,000
NBC	NBA PLAYOFF GM 3	\$ 504,000
NBC	NBA BSKB GM-3	\$ 476,500
NBC	NBA BASKETBALL-GAME	\$ 404,400
UPN	XFL FOOTBALL/UPN	\$ 367,600

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 7 Network TV Variety Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
FOX	MAD TV/FOX	\$ 5,782,300
NBC	SATURDAY NIGHT LIVE-NBC	\$ 2,378,400
NBC	SNL MOTHER'S DAY	\$ 183,000
NBC	SCTV	\$ 74,600
NBC	LATE FRIDAY	\$ 62,100
NBC	SATURDAY NIGHT LIVE LATE	\$ 46,400
FOX	ROCK 'N' ROLL NEW YEAR'S	\$ 17,800

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 10 Network TV Sit-com Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
FOX	THAT '70S SHOW	\$ 5,023,000
FOX	TITUS	\$ 3,583,800
WB	STEVE HARVEY-WB	\$ 981,900
FOX	BERNIE MAC	\$ 370,500
UPN	PARKERS	\$ 232,000
UPN	HUGHLEYS-UPN	\$ 204,400
WB	MEN, WOMEN & DOGS	\$ 172,000
FOX	UNDECLARED	\$ 168,300
UPN	MOESHA/UPN	\$ 159,100
WB	FOR YOUR LOVE-WB	\$ 158,900

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 3 Network TV Talk Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
NBC	LATE NGT/CONAN OBRIEN	\$ 1,228,900
CBS	LATE LATE SHOW/CRAIG KLB	\$ 122,700
NBC	TONIGHT SHOW	\$ 107,800

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 8 Network TV Drama Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
FOX	DARK ANGEL	\$ 2,679,400
FOX	MURDER IN SMALL TOWN X	\$ 359,200
FOX	BOSTON PUBLIC	\$ 338,800
FOX	X-FILES/FOX	\$ 303,200
NBC	PASSIONS	\$ 141,700
UPN	STAR TREK: VOYAGER/UPN	\$ 97,500
NBC	DAYS OF OUR LIVES	\$ 67,200
FOX	NIGHT VISIONS	\$ 58,800

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 8 Network TV Movie Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
FOX	FOX NIGHT AT THE MV	\$ 527,900
NBC	NBC MOVIE OF/WEEK-SAT	\$ 277,000
ABC	ABC MONDAY NIGHT MV	\$ 152,200
NBC	TITANIC-NBC	\$ 90,000
NBC	NBC SUNDAY NIGHT MV	\$ 87,000
UPN	UPN NIGHT AT THE MOVIES	\$ 83,600
UPN	UPN FRIDAY NIGHT MOVIE	\$ 81,100
UPN	UPN SATURDAY AFTN MV	\$ 14,900

Source: Competitive Media Reporting, 2001, Nielsen 2001

Top 10 cable program charts

Top 10 Cable TV Variety Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
COM	SATURDAY NIGHT LIVE	\$ 1,509,208
VH-1	INSOMNIAC MUSIC THEATER	\$ 535,562
BET	COMICVIEW	\$ 403,686
COM	COMEDY CENTRAL PRESENTS	\$ 253,491
VH-1	ROCK ACROSS AMERICA	\$ 157,175
COM	WHOSE LINE/IT ANYWAY	\$ 143,196
VH-1	TOP 20 COUNTDOWN	\$ 93,031
VH-1	MOST SHOCKING MOMENTS IN	\$ 82,369
COM	PREMIUM BLEND	\$ 78,552
VH-1	STORYTELLERS	\$ 52,909

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 10 Cable TV Sports Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
ESPN	SPORTSCENTER	\$ 14,131,271
ESPN	BASEBALL TONIGHT	\$ 2,101,865
ESPN	STANLEY CUP PLAYFFS	\$ 2,029,310
ESPN	CLG BSKB GAME	\$ 979,136
TNT	NBA BSKB PLAYOFFS	\$ 940,537
TNT	PRO BSKB GAME	\$ 726,009
ESPN	MAJOR LEAGUE BASEBALL	\$ 463,795
TBS	PRO BSKB GAME	\$ 435,026
ESPN	PRO HOCKEY GAME	\$ 353,203
ESPN	CLG FTBLL GAME	\$ 253,655

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 10 Cable TV Sit-com Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
COM	MAN SHOW	\$ 557,115
TBS	FRESH PRINCE	\$ 302,452
COM	THAT'S MY BUSH!	\$ 236,210
COM	SOUTH PARK	\$ 184,331
FX	IN LIVING COLOR	\$ 174,009
FX	SON OF THE BEACH	\$ 170,813
COM	SPORTS NIGHT/CABLE	\$ 146,358
USA	MARTIN	\$ 143,046
FX	MARRIED/CHILDREN	\$ 121,304
TBS	ROSEANNE	\$ 57,369

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 10 Cable TV Talk Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
COM	DAILY SHOW	\$ 1,005,758
E!	HOWARD STERN SHOW	\$ 748,411
E!	TALK SOUP	\$ 174,549
FX	TEST	\$ 125,335
BET	BET LIVE	\$ 100,268
FX	X SHOW	\$ 91,912
COM	CHRIS WYLDE	\$ 45,581
E!	A.J. AFTER HOURS	\$ 31,984
COM	TURN BEN STEIN ON	\$ 26,474
E!	E NEWS DAILY	\$ 13,288

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 10 Cable TV Drama Programs with Youth Overexposure by Dollars

Source	Program	Total Dollars
COM	KIDS IN/HALL	\$ 200,733
E!	TRUE HOLLYWOOD STORY	\$ 153,676
SCFI	BABYLON 5	\$ 127,256
USA	LA FEMME NIKITA	\$ 108,914
FX	MILLENNIUM/FX	\$ 88,354
FX	X-FILES	\$ 61,853
FX	BUFFY THE VAMPIRE SLA-FX	\$ 54,821
USA	BAYWATCH	\$ 48,061
LIFE	UNSOLVED MYSTERIES	\$ 46,771
SCFI	QUANTUM LEAP	\$ 35,067

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

Top 10 Cable TV Movie Programs with Youth Overexposure by Dollars

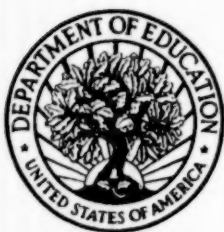
Source	Program	Total Dollars
TNT	BLADE MOVIE	\$ 178,443
TBS	THE REPLACEMENT KILL/MOV	\$ 128,919
FX	STARSHIP TROOPERS	\$ 110,877
TBS	RUSH HOUR	\$ 92,625
COM	BOOTY CALL	\$ 78,042
COM	HOW TO BE A PLAYER	\$ 72,123
TBS	DUMB AND DUMBER MOVIE	\$ 71,741
COM	UP IN SMOKE	\$ 70,479
TBS	MAJOR LEAGUE: BACK TO TH	\$ 70,058
VH-1	TOO LEGIT: THE MC HAMMER	\$ 64,664

Source: Competitive Media Reporting 2001, Nielsen Media Research 2001

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